Script for KSWebIZ DEMO Training

Welcome to KSWebIZ's! KSWebIZ is a web-based centralized birth to death cohort database that maintains complete, accurate, and secure immunization records for all Kansas residents. This is training for use of KSWebIZ. Users are able to access KSWebIZ to view and update demographics, immunization records and print Kansas Certificate of Immunizations (KCI) forms, pink cards and recommendations based on the ACIP (Advisory Committee on Immunization Practices) schedules.

System requirements for KSWebIZ school module are internet access, Internet Explorer 5.0 (and higher) and Adobe Acrobat Reader (which is a free download from Adobe). KSWebIZ is Internet Explorer based, and other browsers such as Mozilla's Firefox or Safari will not include all of the enhancements shown on Internet Explorer.

To first log onto KSWebIZ, please type in the following address:

https://kanphix.kdhe.state.ks.us

This address will take you to KanPhix, this is the Kansas Personal Health Information Exchange. Under Secure Portal click Log-In and you will arrive at the RSA Secure ID log in window. If you are a first time user, you will need to create a PIN (Personal Identification Number). Using your token (the security device you will use to log onto KSWebIZ) and the business card that came with your token, Type your User ID in the first window, then type in the six digits on the front of the token. When you look at the front of the token, there are six black bars that appear to the left of the numbers. Each bar represents 10 seconds. If the device is down to one bar or no bars, wait until the device changes to a new number before attempting to log in. Please enter the six numbers showing on the device into the Passcode area.

Click the "Log In" button. A screen will appear telling you "New RSA SecurID PIN Required." You must create a PIN that has 4 to 8 numbers only (no characters or spaces). Enter the PIN once to create it in the NEW PIN field and confirm the New PIN on the next line. Click "OK."

Once your PIN has been accepted you will see a screen that shows "New PIN accepted." You will now enter the PIN you just created along with the six numbers that appear on your token. (The PIN and token numbers are your PASSCODE). This is the process you will use each time you access KSWebIZ. When successful the screen will show "Authentication Succeeded" and then the "Welcome to KANPHIX" screen. Click on the blue link to acknowledge and be taken to the KANPHIX portal. Under Health Services, you will click on "Kansas immunization Registry" to access KSWebIZ.

The screen you now see is our Homepage. On the homepage you will find the Default Provider/Clinic as well as announcements about vaccinations and KSWebIZ. As you scroll down the page, you will see that there are announcements regarding vaccines as well as tips on how to utilize various KSWebIZ modules. The latest announcements will appear at the top along with the dates the announcements were placed on the page. At the upper part of the screen you will see the provider and clinic, and to the far right, your name as well as a link to log out. Clicking on "Logout" will take you back to the KANPHIX portal.

If you do not see your entire provider listed, please call the KSWebIZ Helpdesk at 1-877-296-0464 or email the helpdesk at immregistry@kdheks.gov so the correct provider and clinic can be associated to you.

To the left in the tan frame is the main menu for KSWebIZ. Listed are:

- Home
- Patients
- Immunizations
- Inventory
- Reports
- Settings

Beside both the Patients, Inventory, and Settings link are plus signs. When you click on the plus sign next to Patients a sub menu will appear below Patients. The submenu has links for:

- Search
- Demographics
- Local IDs
- Programs
- Notes
- Precautions/Contraindications
- Consent
- Events

This concludes the Login Module of KSWebIZ. If you are not comfortable with the Login Module windows please call our Helpdesk at 877-296-0464 or email at immregistry@kdheks.gov with questions you may have.

Patients Module

In this training segment we will explore the Patient Module. The Patient Module is used to search the Kansas Registry to view or edit Patient Information.

To open the Patients Module move your cursor over to the word "Patients" in the main menu on the left side of the screen. Click on the plus sign next to the word Patients to drop down the Patients submenu.

Search

To search for a patient, click the Search link and the Patient Search screen will appear. The system does not allow for random searching. In the Search Criteria window you can search for a patient by entering the Patient ID, an Identifier Type and Value, or the Last and First names. In order to search by an Identifier Type and Value this information needs to be entered manually in the Demographic or Local ID windows prior to searching. The most common way to search for a Patient is by Last and First name. At least two letters of the last and first name need to be entered in order to search. You can narrow the search even more by including the date of birth. The "Previous Criteria" button will allow you to auto populate any previous criteria used to search for a patient.

Proceed by entering the Patient's name. Type in 2-4 letters of the last name and 2-4 letters of the first name and press "Enter" on your keyboard or click "Search" in the screen. If you would like to use any other search criteria you may. The screen will refresh with any matching patients. If you do not see the patient you are looking for, you can broaden your search by putting in less information. If you are positive that the patient is not in the system, you can click on the "New Patient" button at the bottom of the screen. When creating a new patient, enter the required information, which is Last name, First name, Date of Birth, and Gender and then click the "Create" button here at the lower right hand corner. Clicking Create will automatically send you to the demographic window.

Since our patient is already in the registry, we will return to the search results to find her information.

Once you find your patient you'll see a Patient ID number, to the left of their name, which is a unique identifier that the system gives each patient in KSWebIZ. You can also see the matching patient's last name, first name, middle name, Gender, date of birth, and icons indicating notes and precautions/contraindications. The green icon with the question mark will show you who created and last updated the patient in the system. Remember, if you are using Firefox or Safari as your browser, you will not see the popup when you hover over the links. These links will follow the patient throughout each screen in the system. If you found the correct patient highlight the green radial button to the left of the patient's name and click on the "Demographic" button at the bottom of the window or double click anywhere on the patients line. If you are not sure this is the correct patient, you can view the patient demographics or the immunization window to confirm the patient.

Demographics

To update demographics, click on "Demographics" under Patients in the main menu. The Patient Demographics screen allows you to view and/or update the patient's name, gender, DOB, VFC Eligibility, and address, (In order to Add Vaccines in the

Immunization Module these six required bold fields must be populated). You may also enter additional contact and patient information here. The patient's mailing address and physical address are separated for those patients who may not have the same physical address and mailing address. If the addresses are the same, to save time and prevent errors, you can copy the mailing address to the physical address or vice versa and the system will auto-populate the address into the correct area. After you have updated the information, click the Update button located at either the top or the bottom right of the page.

Local IDs

The next Patient submenu is Local IDs. Click on Local IDs in the Patients submenu to proceed. Providers will typically have their own unique identifier for each of their patients. This could be a medical record number, a chart number, an identifier assigned by their internal EMR/EHR system, etc. The Patient Local Identifier screens allow a provider/clinic to associate their own identifier to the corresponding record in the Registry. This information can be used when searching the Registry. Only those users associated to a provider/clinic will have access to this data.

When you first view the Local IDs screen, a summary of all existing local IDs for any provider/clinic you are associated with is displayed. You can click the View button (or double-click on the entry) to see the full record or click the Add Local Identifier button to add a new entry.

Programs

To locate existing Public Health programs click on the Programs submenu. KSWebIZ can be extended to support multiple Public Health programs.

KSWebIZ automatically registers a patient in the Immunization program when the first immunization is given to a patient. You can refer to the Programs screen to view the registration date. If programs other than Immunization are using the patient registration capabilities of KSWebIZ, you may see that a patient is registered in additional programs.

To inactivate a Patient whom you are no longer serving click on the View button to the right of the Immunization Program. Enter the Close Date and Reason to indicate their inactivity. Doing this will keep your Immunization Rates report accurate.

Note: If a patient has been marked as inactive but receives an administered immunization after the program close date (and as long as default provider takes ownership) then the system will automatically remove the close date and close reason and the patient will be active again.

Notes

Our next Patient submenu is notes. You have the ability to add notes to your patient's record and to add a note to their record you would click on "Notes" under "Patients" in the main menu. On the notes screen you can view the notes that have been created by clicking the "View" button on each note. You can add a note by clicking "Add Note" in the upper right corner. The date, author, provider and school district will auto-populate. There are eight different note types you can choose from:

1. General
2. IZ – immunization note
3. IZ Record (Print) – An immunization note that can be printed to the Pink Card
4. Health
5. Patient Status
6. Refused Vaccination—you can type which vaccination was refused and the reason why in the note section. Populates this refusal to the Pink Card
7. Provider Specific – Only the provider/clinic that entered the note can see the note
8. Vaccine Refusal (no print)—this will not populate the refused vaccine on the Pink Card

Once you select your note type, you can add comments under the "Note" section.

When you click "Create" it will show "Record Saved" with the date and time and an icon will be place by the Allergies/Risk icon and the green circle icon.

Precautions/Contraindications

Adding precaution/contraindications will place an icon to the patient's record in the form of a Red Cross Symbol. This alerts a provider or user that an allergy/risk is associated to this patient. To add or view precaution/contraindications, click on Precaution/Contraindications under Patients in the main menu. If a precaution/contraindication has been created you will see it under the patient's name, patient ID and their date of birth. Listed will be the Precaution or Contraindications, the effective date, an expiration date (if there is one) and comments.

In order to add a new precaution/contraindications, you can click on "Add Precaution/Contraindications" located at the top right of the window. A box will appear with your name as the author, an effective date populated with the current date and the Provider will be listed. Choose the Precaution/Contraindication using the drop down arrow and select the one you need. Add any comments in the comments field and click "Create." Once you create the precaution/contraindication, the associated vaccines will appear and the icon with the Red Cross symbol will be placed on the patient's record.

If you have a precaution/contraindication that has an expiration date (for instance a due date for a pregnant patient). Insert the date under "Expiration Date." When you click

“Create” the recommender will not recommend the associated vaccines until after the patient’s due date. This will also work for those patients who may have a timeframe where they cannot receive shots. You can choose “Other Contraindication” put a date in the “Expiration Date” and the recommender will not run until after the Expiration Date and yet the Red Cross icon will appear on the patients’ record so that it can be viewed by those who have access to KSWebIZ.

Consent

The Patient Consent screens allow you to enter and categorize consent records for a patient. You can document who gave the consent (i.e. patient or some other contact), which program the consent applies to, and the type of consent that has been granted.

Navigate to the Consent submenu item under the Patients module on the Main menu. When you first view the Consent screen, a summary of all existing entries is displayed. You can click the View button (or double-click on the entry) for a consent entry to see the full record or click the Add Consent button. Select your Consent method and then click create to add consent. Comments can be entered.

Events

The Patient Events screens allow you to view and update information about events that pertain to the patient and are associated with a particular date. Typical event types include acknowledgement of a HIPAA notice and smallpox wound examinations and dressing changes. These can be added by the system (e.g., when the reminder dates are generated) or manually (e.g. for non-vaccine events).

Navigate to the Events screen by clicking the Events submenu item under the Patients module on the Main menu. When you first view the Events screen, a summary of all existing events is displayed. You can click the View button (or double-click on the entry) for a specific event to see the full record or click the Add Event button. Select your Event Type and then click create. Comments can be entered.

Using the Patient Module you will be able to Search for your patients, update their information, and confirm that you are giving them the proper treatment. You will always start here to find your patients before moving on to updating their Immunization Information.

This concludes the Patient Module of KSWebIZ. If you are not comfortable with the Patient Module windows please call our Helpdesk at 877-296-0464 or email at immregistry@kdheks.gov with questions you may have.

Immunizations Module

Welcome to KSWebIZ online training. This segment covers the immunization module. In order to see what Immunizations a patient has received, we first need to locate a patient. Like we learned in the previous training click on Search in the Patient submenu. Once you've found your patient click on Immunizations to see their record. Remember that your patient stays with you until you search for another.

To view the patient's immunizations, in the main menu, click on the "Immunizations" link. At the top of the screen there are links for printing the Immunization Record (Pink Card) as well as the Kansas Certificate of Immunization (KCI) form. You should make sure that your patient's immunizations are up-to-date before printing off either the pink card or KCI form. The vaccination screen shows the patient's name, patient ID number, their date of birth and their current age. The notes icon as well as the Precautions/Contraindications icon has followed us throughout each screen.

This screen shows the vaccine the patient has had, the dose number they have received, the date they had received the shots, the age they were when they received the shot as well as the clinic they received the shot at. PR stands for patient record and means that the record was taken from the patient's pink card. To the right of the vaccine you will see an update button and by clicking on it, it will show you the lot numbers administered for that specific vaccine or additional historical data. This is also where you can enter adverse reactions. To enter an Adverse Reaction fill out the fields under Reaction 1. Then click on the Vaccine Adverse Event Reporting System (VAERS) link. Print the page to complete it and then fax or email it back to the VAERS program. Note: Another important piece to this window is if you have created an administered or historical dose you do have the ability to delete it, if there was an error in creation. Scroll to the bottom of the window and click delete. Once finished in this window click cancel to return to the Immunization window. The little green circle icon with the question mark shows when the shot was created and who last updated the record. If you see a small red exclamation point, this shows that the shot is considered invalid by the recommender and could be either from invalid age or date intervals. A red circle with a white dash through it indicates the Patient had an adverse reaction to the vaccine administered. If you see a blue circle with an H, this indicates the dose was entered in as a historical vaccine.

Adding History

Click on the Add History button in the upper right part of the screen. On this screen you will see the Patient's Name, the patient number and their date of birth. You will also see two buttons below their name that shows "Child Vaccines" and "All Vaccines." The listing of vaccines you see defaults to the "Child Vaccines." If you do not see all of the vaccines that you need to add history for, click on the "All Vaccines" button to view all of the vaccines a person can receive. They are listed in alphabetical order. If you notice, the Past Vaccination Clinic is defaulted to "Patient Record-PR." If you have the pink card and you know where the patient received their vaccination, you can choose the provider from the drop down list on Past Vaccination Clinic. You can also choose to leave it as Patient Record (This is what we would recommend). As I said before, you will see that the vaccinations are listed in alphabetical order. Right now, you are viewing the screen with date box fields next to the vaccine listed. On this screen to enter a vaccine, type in the date next to the vaccine you are working with. If you notice, the patient's vaccination history is listed underneath each antigen they have received. Once you have entered all of the past history that needs to be added, click the "Add" button to be taken back to Immunization screen.

The Vaccine Recommender

Further down the page, after the list of vaccinations, there is a gray bar that says Recommend. Clicking on this bar will bring up the recommender for the patient. The recommender is based on the ACIP (Advisory Committee on Immunization Practices) schedule. The page that comes up is a screen that you can only print or close. This page is a wonderful tool to give to patients' parents who are wondering what shots their child needs. The recommender shows the Patient's name, Patient ID, their date of birth, how old they are in both years/months as well as days. You can view their full vaccination history with the vaccine they received, the dose number, date they received the vaccine, the age they were and the clinic where they received it. Any vaccine that may be invalidated by the recommender will have an explanation to the right of the vaccine.

Scrolling down the page, you will see the Recommended Immunizations for today. Further down the page you will see future recommendations of vaccinations, the date the patient should receive the shot, their age when they receive the shot both in years, and months as well as total age in days. There are also buttons to either print or close the recommender here at the bottom of the page.

Settings Module

In order to change the window preferences in the Immunization and Add History windows locate Settings off of the Main menu. Click on the Settings. Then select User Defaults. These setting will allow you to see today's recommendations on the immunization window rather than clicking on the Recommend button, doses recommended to auto-populate to the Add Vaccines window, and edit the way historical doses are entered in the Add History window. Once in the Edit window you'll see where you can change these settings. Check the Auto-Populate Recommended Vaccines on Add Vaccination Screen and Display Today's Recommendations boxes. To change the History screen click the drop down arrow on the Type of boxes to change from Date boxes to Check boxes. You can also increase the number of boxes from 4 up to 12. Click "Update" and the Record Saved message will show in green at the top and bottom of the page. You will need to click on the Immunization link to the left in the main menu to be taken back to the Immunization page. Once there, check the immunization window to see today's recommendation displayed and click the "Add History" button to view the changes you made to the "Add History" screen. If you are a data entry person and you would prefer to enter dates only into the past vaccination history, you can do so by changing your "User Default Settings."

Adding Vaccines

To view what is recommended for today if anything, click on the gray recommend button at the bottom of this screen or change your settings in order to always see what is recommended today.

If you had the Auto-Populate Add Vaccination Screen checkbox selected on the Immunization Home screen, any vaccines identified by the Recommender as being needed today will be pre-populated on the screen. If the checkbox was not selected or if no vaccines are required, the list will be empty. In either case, you can add or remove vaccines from the list. Click the Add Vaccines button near the top of the screen.

The immunizations being recommended can either be added or administered following this window. There are a few ways to utilize the Consent form from KSWebIZ.

Option 1: <u>Adding Vaccine before Administering</u>

Enter the date the vaccine is to be given. Clicking Create will add vaccine to the record without it showing as administered. The window will refresh, returning you to the immunization home window. You will now see syringes placed to the right of the vaccine indicating it was added but not administered. Click on the Consent form found at the top of the window. The form will now show the available lot numbers from your On Hand Inventory window. Prepare the vaccine. Confirm lot numbers expiration dates. Pick the lot that expires first for vaccine management purposes. Enter patient's room and administer vaccine. Now return to KSWebIZ to administer the dose. Click on the Administer Vaccines button. Locate the nurse who administered the dose by clicking the Administered By field. Then match up the lot numbers you gave to the lots showing in the manufacture/lot drop down bar. Red vaccine is classified as VFC vaccine and Black vaccine is indicated as Private vaccine. The Route and Dosage fields will auto populate. Select the Body Site where the dose was given and then click Update. Locate the Pink Card to be printed and give it to the parent or guardian for their records. If using the consent form in KSWebIZ this is the method we recommend that you use.

Option 2: <u>Administering Vaccine Using Your Paper Consent Form</u>

Fill out your paper consent with the vaccine and lot information that will be administered. Administer the vaccine physically. Return to KSWebIZ and in the Immunization window click on the Add Vaccine button. Enter the date the vaccine was given. Click Create and Administer. Locate the nurse who administered the dose by clicking the Administered By field. Then match up the lot numbers you gave to the lots showing in the manufacture/lot drop down bar. Red vaccine is classified as VFC vaccine and Black vaccine is indicated as Private vaccine. The Route and Dosage fields will auto populate. Select the Body Site where the dose was given and then click Update. Locate the Pink Card to be printed and give to the parent or guardian for their records.

Option 3: Administering Vaccine Using KSWebIZ Consent Form

Enter the date the vaccine is to be given. Click on the Create and Administer button. Locate the nurse who is going to administer the dose by clicking the Administered By field. Then match up the lot numbers you will be giving with the lots showing in the manufacture/lot drop down bar. Red vaccine is classified as VFC vaccine and Black vaccine is indicated as Private vaccine. The Route and Dosage fields will auto populate. Select the Body Site where the dose was given and then click Update. Click on the Consent form found at the top of the window. This would also be a good time to print the Pink Card. The Consent form will now show the lot numbers you are about to administer. Prepare the vaccine. Confirm lot numbers expiration dates. Enter patient's room and administer vaccine. Hand the Pink Card to the parent or guardian.

As a final note to the Add vaccine window we will explain the two check boxes, Did Not Administer and Delete. Clicking Did Not Administer box will erase the immunization from this window but retain the syringe on the Immunization window. Clicking the Delete check box will erase the immunization from this window and delete the vaccine from the Immunization window. Click update to save your changes.

This concludes the Immunization Module of KSWebIZ. If you are not comfortable with the Immunization Module windows please call our Helpdesk at 877-296-0464 or email at immregistry@kdheks.gov with questions you may have.

Inventory Module

Welcome to the Kansas WebIZ Inventory Training. The Inventory Module will keep track of your vaccine inventory as you administer shots. This aids in reporting VFC vaccine usage to the CDC and Private vaccine to your provider.

On-Hand

Navigate to the Vaccine Inventory On-Hand screen by selecting the Inventory item in the Main menu. From there, select the Vaccines link in the submenu. You can also select the On-Hand item in the submenu under Vaccines.

The Inventory On-Hand Screen is a quick way to view all of the inventory items on hand at every Inventory Location within your organization. The On-Hand Inventory provides specific information about your vaccine. This includes:

Fields and Icons

- **Vaccine (Brand) -** The specific vaccine in inventory.
- **Mfg -** The MVX code for the vaccine manufacturer.
- **NDC -** The National Drug Code.
- **Lot No -** The lot number for the vaccine.
- **Exp Date -** The expiration date of the vaccine.
- **Funding Source -** The funding source that purchased the vaccine.
- **Doses On-Hand -** The number of doses of this vaccine currently on-hand.
- **Green Circle with ? mark in it -** Who Created and last Updated this vaccine.

Buttons and Navigation

- To **Add New Inventory** Click the Add New Inventory button. Note: This is vaccine received from the manufacturer, not transferred vaccine or any other type of vaccine. Populate the Inventory Location, Vaccine|Mfg|NDC|Brand Drop down, Lot Number (from the box), Expiration Date, Funding Source, Doses Adjusted, and any comments needed. Then click create. If there are any Inventory items found with similar criteria then a Possible Duplicate window will appear. If you have an exact match then click Add to On-Hand otherwise click on Proceed with Create if you do not have an exact match. Click cancel to exit this window.
- Next is the **Pending Inventory Transfers link.** Select this link to view inventory transfers that have not yet been accepted by the receiving provider or those that are waiting for you to receive into your inventory.

We will now go over the different filters that are available in the On-Hand window.

- **Inventory Location drop-down menu.** From the list of values provided you can filter the screen by selecting the Inventory Location of choice.
- **Status drop-down menu** allows **y**ou to filter the screen based on current inventory on-hand, depleted and expired, expiring soon, or all inventory.
- **Vaccine drop-down menu** allows you to narrow in on a specific vaccine if desired.
- **Funding Source drop-down menu** allows you to filter the screen by inventory funding source if desired.

Now that we know what we are looking at there are four different buttons used to maintain our inventory. Our first button is Edits.

- **Edit.** Select the desired inventory row and then click this button to display the Vaccine Inventory Item screen where a subset of fields may be updated for an inventory line item. Select what needs to be edited and click update. Note:

Modifying this inventory item will also change all inventory transactions and all vaccination records where this dose was administered.

The second button is Adjustments.

- **Adjustment.** Select the desired inventory row and then click this button to display the Vaccine Inventory Adjustment screen with the fields prepopulated with the relevant data from this row. Specify the date the adjustment occurred and then select your Reason for adjustment. The available reasons in the drop down window are Expired (vaccine that has met its expiration date), Wasted (vaccine that is either unavoidably or avoidably wasted), Extra (multi dose vials that have more or less vaccine then what is stated on the box), Recall (vaccine that has been classified as either a safety or non safety related recall from the manufacturer). The Unaccounted reason will generally be used by administrative staff to account for lost vaccine. The Add Initial Inventory reason is used when new vaccine has been received from the manufacturer. When adjustments are made it places that adjustment in the Reconciliation column is corresponds with. Manual Adjustments need to be made in order for the vaccine to show accounted for in the Reconciliation window. **Note:** Entering a positive number increases the inventory. Enter a negative number to decrement inventory.

The third button is Transfers

- **Transfer.** Select the desired inventory row and then click this button to display the Vaccine Inventory Transfer screen with the fields prepopulated with the relevant data from this row. Locate your Destination Inventory Location by clicking on the Inventory Location drop down bar. Select location. Indicate who this is Authorized By. **Note:** If you are transferring to a Non Registry Provider (a provider that is not using KSWebIZ) select Non Registry Provider in the drop down list and be sure to enter their name and VFC pin number in the comments section.

The fourth button is Inquiry

- **Inquiry.** Allows us to see a full history of the transactions made on any given lot number. Select the desired inventory row and then click this button to display the Inventory Transaction Inquiry screen. The fields will be prepopulated with the relevant data from this row. You can filter your inquiry by indicating date ranges or just select Run Report to view the full inquiry.

We will now move to the Reconciliation window

Reconciliation

Purpose: The reconciliation feature in KSWebIZ provides a worksheet-based view to assist in the process of reconciling the amount of inventory in the system with the actual inventory that is on-hand. The reconciliation process gives you, the provider, the opportunity to review data entry quality and ensure that patient immunizations are accurately recorded by the appropriate lot number within the system. In order to create an electronic version of the Monthly Immunization Report (MIR), you must perform reconciliation to "balance the books." **Remember:** Adjustments made in the On Hand window will be reflected in the Reconciliation window.

Create the Reconciliation Report

1. Click on the Reconciliation button from the main menu.
2. Now, Click on the *Add Reconciliation* bar at the top right. (**Note**: If you're updating a report that has already been created then click on *View* next to the appropriate report period).
    - Select your **Inventory Location** to be reconciled in this report.
    - Input the **Description** which is the name of the reconciliation (typically the month and year).
    - Enter the **Begin Date –** The beginning date of the reconciliation.
        - This date will only be entered for the first reconciliation report that is created. Subsequent reports will have a beginning date that defaults to the date after the end date of the previous reconciliation period.
    - Enter the **End Date –** The ending date of the reconciliation period.
        - Set the *End Date* the same as the date the actual hard-count inventory is taken. Note: The End Date should be the last day of the month. Also make sure your actual count is at the end of the End Date or the very first thing the next morning, before vaccines are given.
    - The **Status** drop down bar is the status of the report
        - **IMPORTANT** - Do not change the status of the report to *Closed* until the on-hand inventory has been entered, data corrections have been made, and inventory adjustments have been completed by the user.
    - The **Authorized By** field has the name of the user responsible for the reconciliation report.
        - Clicking the icon to the right of this field will automatically populate the field with the user's name.
        - Click the *Create* button.
3. The report will contain the following information for each lot number having doses in the system during the reconciliation period:
    - **Vaccine -** Lists the name, manufacturer, NDC, lot number, and expiration date of each line item in the reconciliation.
    - **Beginning Inventory -** This field is automatically populated by the system. This is always the same value as the ending inventory count on the previous reconciliation.
    - **Inventory Received -** A count of all doses added to the inventory location between the beginning and end dates. This field is read-only and is

automatically populated by the system when new inventory is entered in the On-Hand window.

- **Inventory Administered** - A count of all doses administered between the beginning and end dates. This field is read-only and is automatically populated by the system when doses are administered. Note: Adding History will not decrement this field.
- **Inventory Transferred -** A count of all doses transferred in or out of the inventory location between the beginning and end dates. This field is read-only and is automatically populated by the system when a transfer is created or received.
- **Inventory Recalled –** Any inventory that was recalled by the manufacturer. A manual adjustment is required in order for vaccine to show in this column.
- **Inventory Expired or Wasted -** A count of all doses included in inventory adjustment transactions for expired or wasted doses that are entered between the beginning and end dates of the reconciliation. Note that expired vaccines will report in red on the reconciliation to remind the user to adjust out doses of expired vaccine.
- **Inventory Unaccounted** - A count of doses entered as "Unaccounted or Extra Inventory" during adjustment transactions within the reconciliation period. This field is read-only and is automatically populated by the system when the adjustment is made for these reasons. **Note:** The system will automatically adjust the vaccine to balance the two windows if you are not sure what happened to it.
- **Inventory Delta (+ or -) -** A calculation of the difference between the number of vaccine doses on-hand and the number of doses documented in the system in one of the previous categories. This field is read-only and is automatically populated by the system to account for the difference between your On-Hand inventory and your Ending Inventory.
- **Ending Inventory –** This field is where the user will enter the actual number of doses on hand for each inventory line item.
    - At any point while entering the values, the user may click on the *Update* button at the top of the screen to save the entries and to recalculate the value in the *Vaccine Doses Long or Short (+or-)* field.
    - Note: If your computer is not close to the fridge.
        a) Click on the *Print* tab at the top of the report. Record the number of doses on-hand for each antigen and lot number listed on the report. Identify any lot numbers in the refrigerator that do not appear on the report and thus have not been entered into the system. Enter the count into the Reconciliation report.
- Now that we have entered our Ending Inventory check the Inventory Delta +/- field for any unbalanced line items. When all line items show a zero then you know you are ready to close. Locate the Status drop down bar and change the status to closed and then click update. **Note:** If you

attempt to close with negative or positive line items the system will make automatic adjustments to balance the On Hand inventory with the Ending inventory. The report will not close if the On Hand window attempts to go below 0.

- **Print Icon –** Clicking on this icon will open a new browser window containing an inventory transaction report for the indicated line item over the same time period of the inventory reconciliation.
- **Green "?" Icon –** Hovering over this icon with the mouse will display the audit information for this inventory item.
- To Print your **MIR** – Cancel out of the Reconciliation window. Locate the VFC/State print icon to the right of the recently closed MIR, click on it and a PDF will open.

Vaccine Ordering

This concludes the Inventory Module of KSWebIZ. If you are not comfortable with the Inventory On-Hand and Reconciliation windows please call our Helpdesk at 877-296-0464 or email at immregistry@kdheks.gov with questions you may have.

Reports Module

Welcome to the Kansas WebIZ Online Training covering Reports! The Reports Module allows users to generate reports for Statistical, Patient, and Data Quality Management purposes. In this segment we will generate a few reports and briefly explain how the remaining reports are to be run. To view the reports, click on the reports icon from the main menu. You will notice seven or less sections, depending on your access rights to KSWebIZ. The available sections are Patients, Forms/Informational Documents, Patient Management, Coverage Statistics, Data Quality – User, Inventory Management – Vaccine, and CoCASA. The first section, Patients, allows users to produce Pink Cards and KCI and Consent Forms. The second section, Forms/Informational Documents, allows users to produce the Advisory Committee on Immunization Practices schedules and the Vaccine Information Statements. The remaining sections deal with the reports that can be run by users.

- As I stated before, Patient Reports allows users to produce a Batch of Pink Cards, KCI's, Individual Pink Cards, Administrative Records, Consent Forms, and what the Vaccine Recommendations are for a specific Patient.

- The Forms / Informational Reports section consists of a series of pdf files provided by organizations like ACIP to describe the recommended vaccination schedule, VFC eligibility, provider and clinic information, and Vaccine Information Statements (VIS).

- The Patient Management Reports are intended for those who manage the vaccination process.

- The Coverage Statistics Reports are provided to give the providers information about the number of patients immunized and the doses provided.

- The Data Quality Reports can be used to minimize duplicate patients and vaccinations within the system.

- The Inventory Management Reports allow the inventory managers to run inquires used to view the full history of a vaccine. Inventory managers can also produce their On Hand inventory and Monthly Immunization Reports from this window.

- The Comprehensive Clinic Assessment Software Application (CoCASA) is a tool for assessing immunization practices within a clinic, private practice, or any other environment where immunizations are provided. This software is designed to be used in conjunction with the AFIX (assessment, feedback, incentives, and exchange) strategy.
- CoCASA has data entry and import capabilities. After immunization data have been entered into CoCASA, data analysis capabilities can be utilized to pinpoint strengths and areas of improvement for an individual immunization provider.

We are now going to run a few reports for you. The first one is the **Patient Reminder/Recall Report:**

The objective of the reminder/recall report is to generate a list of patients that are due or past due for vaccinations. While Reminders and Recalls are set up the same way, they are different. A Reminder will generate a report of people, who are due for a vaccination within the time frame of the report, and a Recall will generate a report of people who are overdue for a vaccination within a given time frame. Vaccination and demographic information can be used to narrow the results in order to generate the specific information the provider needs. The lists that are produced can be used to generate reports, print labels and postcards, as well as create a delimited file that can be used in external applications.

The reminder/recall report is found under the Patient Management section. There are also some instructions in this same section that help when setting up the report. To run the report, Click on Patient Reminder/Recall.

The main Reminder/Recall screen displays all previous reminder/recall lists created for the provider. The listing includes the most recent Reminder/Recall first and the oldest one last. The reminder/recall results remain in the system until they are removed by

KSWebIZ staff. The buttons on the reminder page allow the user to review the results and add new reminders.

- The **Cancel** button will return you to the KSWebIZ reports screen.
- Clicking on **Add Reminder/Recall Run** allows the user to create a new Reminder/Recall run.
- Choose an existing reminder/recall and press the **View** button to change criteria. If the report has already been generated during the nightly run then the criteria may only be viewed and cannot be updated.
- In the bottom left hand corner of the page is a button for the **Unvaccinated Report.** This report will provide a list of patients that have not returned to receive vaccine. The report will update each time a patient from the original reminder run comes in to receive the vaccine. This list shows the remaining patients that still need to receive vaccines from the original run.
- To see everyone the Reminder/Recall found click on the **Report** button at the bottom of the page. This report lists those patients that meet the criteria for the associated reminder/recall. The report includes their name, location, contact information, vaccination history and what they currently need. The report could serve as a call list for patient reminders.
- When clicking on **Full Extract,** a new browser window will appear and the patient data for the reminder/recall will be in comma delimited format. This can be imported into excel for mail merge, auto-dialers and other uses. The data can be saved by copying the contents of the browser window and pasting into another application or file.
- **Dymo Labels** will generate a set of address labels designed to be printed on a Dymo Label printer using Dymo address labels.
- And **Avery Labels** will generate address labels to be printed on Avery 5160 style labels. This style of labels is 3x10 per sheet. When printing these labels, be certain to change page scaling to "none" on the printer options box.
- The **Postcard** button generates a report that is suitable to print pre-formatted reminder postcards.

To Create a Reminder/Recall:

1. Click "**Add Reminder/Recall Run**" from the upper right part of the screen.
2. Give the Run a name (example: June 2012 Reminder or June 2012 Recall)
3. Double click in "**Run Scheduled Date**" to add the current day's date. "**Run Completed Date**" will be grayed out.
4. Put the date in the "**Reminder/Recall Date Range**" From and Through fields. When running a reminder you will use dates in the future, and when running recalls you can use today's date in the From and Through date boxes. **Note:** Reminders or recalls may be set up in advance.
5. Indicate the "**Age Range**" in the From and Through boxes. Then, choose Years or Months for the Unit of Measure drop down window.
6. In the **Options to Target Patients Included For Reminder/Recall** fields, you can choose to leave these blank to include all information on the report. The only field

that needs to be checked are the "**Include Patients Due for Vaccinations (Reminders)**" or "**Include Patients Overdue For Vaccinations (Recalls)**" if creating a reminder or recall. You can also input "Minimum/Maximum Number of Days Past Due" to be included in the report.

7. Under **Vaccine Series and Optional Dose**, select the vaccine series that should be assessed when determining the patients that are included in the results. Only patients needing an immunization from the selected series will be included. Optionally, you can also specify the specific dose within the series. In this case, only patients needing dose "X' will be included. For example, by selecting the Varicella series and entering a "2" in the dose field, the results will only include patients needing a second dose of the Varicella vaccine. Leaving the dose number field blank will include all patients needing a vaccine from the indicated series but will not restrict the results to a specific dose.
8. In this next section you may exclude patients from the Reminder/Recall if they have a specific type of insurance. This might be used to target patients with Medicare by excluding patients associated to any other form of insurance. By default, all insurance sources are included.
9. Click "Create" after making your choices. Due to the large amount of data that this report must process, this report will not be completed until the day after it is created. This is the only report that does not operate in real time, but must be run overnight. The reports will be generated as pdf files for ease of viewing, saving and printing.
10. Reminders and recalls should be run separate from each other.

The next report to be generated is the **Dosage Report.**

The **Dosage Report** allows you to see how many doses you have administered for each vaccine within a certain time frame. To create a **Dosage Report:**

1. Select "**Dosage Report**" from the Coverage Statistics section.
2. Select the **Report Type**.
3. The **Provider** and **Clinic** will automatically be populated.
4. Choose Vaccines from the drop down box—you can leave this blank to select all vaccines.
5. Select your date range. Double clicking in the "From and Through" date box will automatically populate the current day's date.
6. You may filter by Funding Source if you desire.
7. Click "Run Report." The report will be generated as a pdf file for ease of viewing, saving, and printing.

The final report to be generated is going to be the **Immunization Rates Report**. To do this:

1. Select "Immunization Rates Report" from the Coverage Statistics section.
2. The **Provider** and **Clinic** will once again automatically be populated.
3. Select the **Report Type** using the radio buttons.
    a. Choosing **Appropriate Statistics Summary**, will show statistical numbers only.

   b. Choosing **Patients not Properly Immunized Detail**, will produce a report that shows the patients name, and vaccination record along with information on if the vaccine had been invalidated by the recommender.
4. Select **Vaccine Series** (these can be either preset by using the drop down box) or by inputting the doses in each field needed. Leave field set at "0" to leave out that specific vaccine.
5. Choose the Age Range you would like to see and the "As Of Date Range" dates. Double clicking in the date field will auto populate the current day's date in the From and Through fields.
6. Compliance is optional, and can be chosen by either: age of patient or by date.
7. Click "Run Report." This report will also be generated as a pdf.

Some of the commonly used Reports available within the system for data quality management at a provider level include (but not limited to) are:

Patient Management:

- Patient List/Count by Clinic Report – Report gives a summarized or detailed total count and list of patients seen within a specified time frame (among pre-defined age categories). Useful to find age ranges of population served within a specific time frame. (month, quarter, or year).
- Patient Roster
  Generates a list of patients grouped by their default provider/clinic.

Coverage Statistics:

- Clinic Immunization Count – Totals number of immunizations given within a specified time frame and reports it per antigen. Helpful in determining usage rates for ordering of vaccine.
- VFC Category Patient Count Report – This report can give patient counts for specified time frame per VFC eligibility per pre-defined age group. Providers utilize this report to fulfill their VFC enrollment estimate numbers of patients served.

Reports used for Inventory purposes but are found in the Coverage Statistics and Data Quality – User sections:

- Vaccines Added but not Administered – Runs off doses added within the system but not fully administered (associated to lot number, etc). Useful for reconciliation and finding missing doses at the end of the month.
- User Vaccination Details Report – This report can run all vaccines or specific vaccines and determine if a specific user added it or last updated it. The report is run on vaccination date ranges so it can be used to identify missing doses or wrongful data entry.
- VFC Vaccination History – This report can be used to verify that VFC eligibility was updated when a patient was seen so that records are correct. It can also be used to monitor borrowed doses within funding sources.

Note: All other KSWebIZ reports are generated in the same manner as previously shown.

This concludes the Reports Module of KSWebIZ.

This also concludes the KSWebIZ New User Online Training! Congratulations! You are now ready to start implementing KSWebIZ into your school or clinic. Remember if you have any questions at all or would like additional training, don't hesitate to call our Helpdesk at 877-296-0464 or email us at immregistry@kdheks.gov. Thank you for keeping Kansas healthy.